OFFICE OF THE GENERAL COUNSEL
Division of Operations-Management

MEMORANDUM OM 12-15(NxGen) December 2, 2011

To: All Regional Directors, Officers-in-Charge, and Resident Officers

From: Anne Purcell, Associate General Counsel

Subject: **NxGen December Release (Release 4.4)**

Effective December 5, 2011, a number of significant improvements will be implemented in NxGen with respect to templates, participants, actions, case headers and account fields, document visibility, agent roles, and assignment queues for Advice branches. These changes have been incorporated to address concerns raised by field employees.

<u>Template Improvements</u>

- **Taking Documents Out of xEditor by Publish Template Document Button**

In response to feedback from NxGen users who expressed frustration with the challenges of editing documents that were in xEditor, this release will allow users to take a document out of xEditor and make it a regular Word document without changing the status to Filed, Final Version or Issued. After creating and closing a template document, the user can click on the Info button for that document and will see the Publish Template Document button at the top. Clicking on that button will allow the user to "publish" the document, which means the document is taken out of xEditor *without* changing the status. Users should be aware that once a template document is published (removed from xEditor), dates and other edits will not automatically be incorporated and the optional text will not be available.

Because of concern about appeal dates in the letter matching the automated appeal due date in NxGen, the publish template document button is not available for the following document subtypes:

- Dismissal Letter
- Collyer Deferral Letter
- Merit Dismissal Letter
- Unilateral Settlement Agreement Approval Letter
- Compliance Determination

When those documents have language that needs to be revised, we recommend that the Region create and circulate a regular WORD document containing the language of the long form dismissal or the special language for the deferral letter. Once this draft language is approved, the template document can be created and the approved language pasted into that document.

When a template document in xEditor is open and the Info button is clicked, the Publish button will not appear. Instead there will be a button that says "Unlock Template Document." The template document in xEditor must be closed for the publish function to be available.

- **Button Renamed to Edit Template Document**

The name of the button a user sees on the Info screen when opening a template document still in xEditor has been changed to Edit Template Document. Previously the name of that button was "Quick Edit Template", which was confusing to some users. When users click on the Info button of a document created from a template but not yet a regular Word document, two buttons will appear: Edit Template Document and Publish Template Document. Clicking on the Edit Template Document will allow a user to edit the document but keep it in xEditor. As described above, clicking on the Publish Template Document button will take the document out of xEditor and convert it to a Word document.

- **Removed Edit or Read Only Field from Add from Template Window**

The Edit or Read Only field was removed from the Add from Template window so that documents created from a template are always editable without having to make a separate selection on that window.

- **COA (Comment on Appeal) Overrides Removed**

In response to concerns raised about difficulties in editing and finalizing COA templates before submission to the Office of Appeals, the COA template has been fixed and is again available for use.

<u>Participant Improvements</u>

- **Accounts Have Only One Address**

Also in response to feedback we received from the field, participants have been changed so that each account will have only one address. This is expected to resolve the difficulties encountered with accounts, such as the USPS, that had multiple addresses and contacts.

When selecting a participant on a case, addresses will appear for all available choices. This will make selection of Participants from Accounts easier since all search results will now list an address.

- **Account Name Field Extended**

To address problems with fitting the account name in the appropriate field, the Account Name field has been extended so that users will be able to enter names with up to 1000 Characters.

Actions Improvements

- **Election Tally Union choices limited to Participants in Case**

Up until now, when completing an election tally in NxGen, a user had to search all participants to enter the labor organization's name. Now, only the names of the labor organizations entered as participants in the case will be available as choices. This will apply to the Labor Organization 1, 2 or 3, Union to Certify, Proposition Organization or Inclusion Organization.

- **Restriction Placed on Action Deletion and Renaming**

If an Action Type is renamed or deleted, all documents in the original folder become unavailable. Thus, users would inadvertently lose documents when they renamed/deleted a folder. To avoid this problem a restriction has been placed on deleting and renaming actions. Now, in order to delete or rename an action, the Action Type must be blank. Be aware however, that even if the Action Type is blank, an action should still not be deleted if the action contains documents because those documents will be "orphaned" and unavailable.

Case Header and Account Fields Improvements

- **Case Name Field Increased to 2000 Characters**

To accommodate some lengthy Case Names, the Case Name field has been increased in size so that it will accept up to 2000 characters.

- **Charging Party and Charged Party Fields Not Case Sensitive In Queries**

The Charging Party and Charged Party fields are no longer case sensitive so that if you query for a party's name either from the Cases tab or the Actions tab, the name will appear without regard to capitalization. This will make querying for cases or names with mixed capitals (e.g., McDonald v. Mcdonald, Walmart v. WalMart) easier.

- **Breadcrumbs Show the Case Number instead of Case Name**

To eliminate the string of breadcrumbs from running off the page, the breadcrumbs will now show the case number instead of lengthier case name.

- **Case Closing - No Closing Date Greater than Today**

To assist in avoiding closures with an incorrect future date, users will not be able to select a Closing Date in the future.

- **Picklist for Bargaining Unit ID (default of A).**

The field for Bargaining Unit ID now defaults to A. This field is also used on the Tally of Ballots when there are multiple Units in an R Case. This should make completing the tally much less confusing.

<u>Document Visibility Improvements</u>

- **Easy Identification of Public Documents**

A public flag has been added that will allow users to easily identify public documents, such as redacted dismissal letters and RD Decisions. The public flag is visible on the Case File tab and on the Action / Document tab.

<u>Agent and Supervisor Role Improvements</u>

- **New Case Team Roles of Additional Agent and Additional Supervisor**

When a new Agent is designated with the Role of Agent/Attorney in either an Action or Case, the Agent with the original Role of Agent/Attorney will change to Additional Agent/Attorney. The new Agent will automatically be designated as Primary for the Action. If the initial Agent is no longer working on the Action or Case, users should put an End Date on their role. This process is the same for the Role of Supervisor and Additional Supervisor. In addition, the new Role of Agent/Attorney will automatically be marked as Primary. This change will make the appropriate agent and supervisor appear on the Region's casehandling reports.

For IRAP and permanently transferred cases, the reassignment of the receiving Region's Assignment Queue Position has been made easier. Once the sending Region places the receiving Region's Assignment Queue on the Investigation Action for IRAP cases and makes the receiving Region the Primary on that Action, everyone in the receiving Region will have access to the Investigation.

New Assignment Queues for RAB and ILB

- **Both RAB and ILB will have its own Assignment Queue**

When the Regions submit an Advice memo to the Regional Advice Branch or a 10(j) memo to the Injunction Litigation Branch, they will now be able to select the assignment queue for the branch to which they are submitting their case.

New Injunction Litigation Document Subtypes

- **New Document Subtypes for Specific ILB Submissions**

In response to NxGen deployment to Advice and the Injunction Litigation Branch on December 5, Regions should use new document subtypes when uploading specific types of ILB submissions to the casefile. Thus, Regions should use the existing subtype entitled “10(j) Submission to ILB” **only** for recommendations for or against authorization to seek injunctive relief. Thereafter, Regions should use the following document subtypes for further submissions to ILB:

- **10(j) or 10(l) Appeal Recommendation**
- **10(j) or 10(l) Contempt Recommendation**
- **10(j) or 10(l) Litigation Advice Submission**

As with any document uploaded and submitted to a Headquarters office, Regions should **first** place the pertinent HQ assignment queue on the Task team of the document (here, the **ILB Assignment Queue**) and **then** change the status of the uploaded document to **Final Version**.

Training

Training with the Regional “NxPerts” concerning these changes was held on Thursday, December 1, 2011. A PowerPoint and Video is available on the Operations NxGen Training Library page. NxPerts are expected to ensure that the appropriate individuals in their respective offices are trained.

/s/
A.P.

cc: NLRBU